

Colleague⁷

Release Notes

Build: 18.09.01

Colleague Software Ltd

Date Created: 18/09/18

Colleague 7 Release Notes - 18.09.01

1. Introduction

This document communicates the new features and changes in this release of Colleague 7.

2. About This Release

Sprint Goal: Refine the Quick Search and Notifications within Colleague 7 so that these are optimised to improve performance.

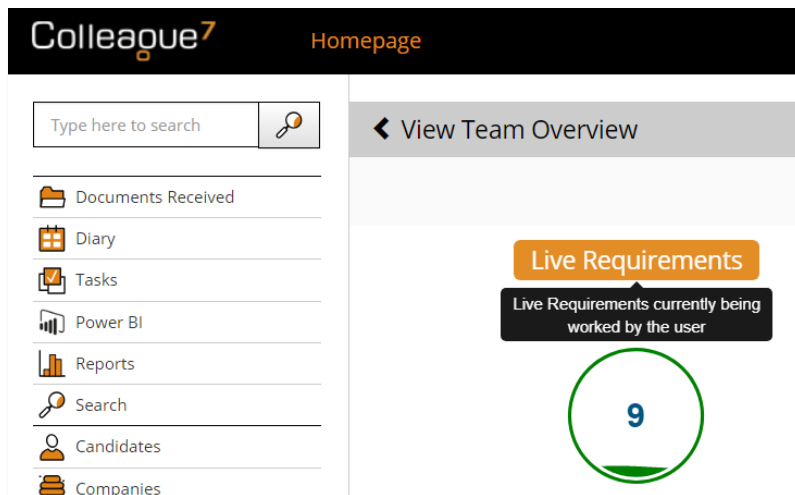
3. New Features

3.1 Overview KPI Dial - Tooltips

State: Done

Type: Enhancement

User Notes: There is now a Tooltip on mouseover of the Overview Dial labels. This will help offer a summarised overview on the criteria behind the number which is shown.



3.2 Ordering of Documents?

State: Done

Type: Enhancement

User Notes: It is now possible to configure the order which Documents appear on the Documents tab of a record. There is a new Global and User Setting where the user can configure this. The possible options are:

- Date Uploaded
- Date Amended
- Alphabetical

The order type selected will then determine the ordering of Documents on an entity record (default: Date Uploaded).

3.3 SMS - Text to Reply Tickbox - User/Global Setting

State: Done

Type: Enhancement

User Notes: A new global/user setting has been added to allow users to default the value of the 'Allow recipients to reply' tickbox when creating an SMS.

This setting is under the section 'Integrations' and is called "When creating an SMS message, default the 'Allow recipients to reply' to be on?"

3.4 Implement notification updates into the new background process cloud service

State: Done

Type: Enhancement

User Notes: The process of creating notifications from Contacts clicking on CV Download links has been moved so that the processing now takes place in a separate Azure service. This work was done to improve performance for Colleague 7 users.

3.5 Refine Quick Search For Optimal Performance

State: Done

Type: Enhancement

User Notes: The Quick Search function has been updated to search over the following fields:

- Candidate : id, forenames, surname, full name, known as, all phone numbers, all email addresses, address, preferred job title
- Company : id, name
- Contact : id, forenames, surname, full name, known as, job title, all phone numbers, all email addresses, address
- Requirement : id, job title
- Interview : id, job title
- Placement : id, job title

It will also exclude any deleted records

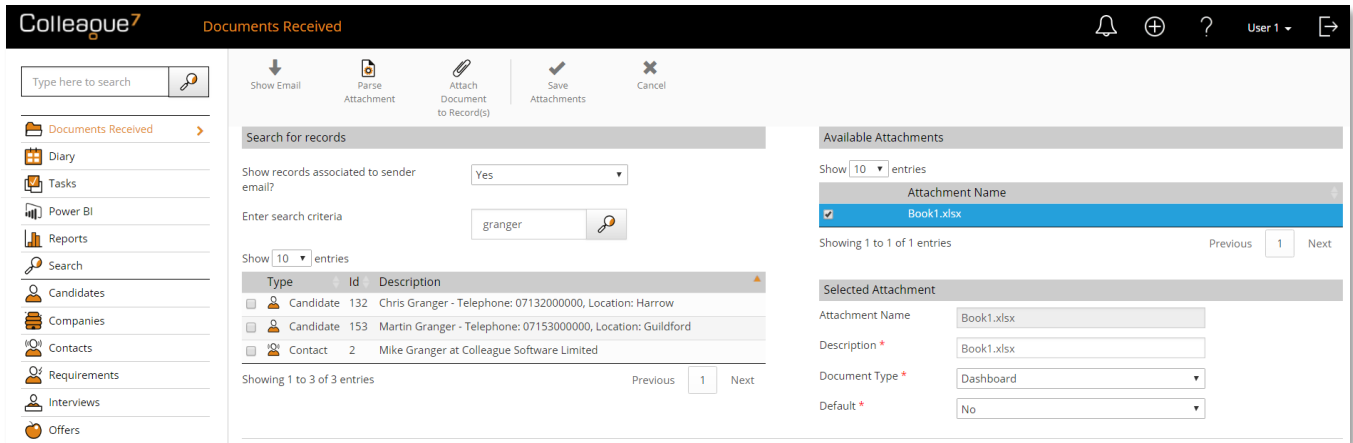
4. Bug Fixes

4.1 Update Attach Document Workflow To Allow For Individual Documents To Be Attached

State: Done

Type: Bug

User Notes: It is now possible to select individual documents to attach to records in the Documents Received area. After clicking on an email and clicking 'Attach Document to Record(s)', the user can now click on checkboxes against each document in the 'Available Attachments' table to select which documents will be attached to the selected records. The "Attach Document to Record(s)" UI has also been redesigned. See screenshot below.



4.2 Error Management When Searching

State: Done

Type: Bug

User Notes: A new Global Setting has been added (found in Search Settings) that configures the number of seconds before Search generates a timeout error when performing a Search to retrieve a count, if any errors happen, the user will be presented with a message saying so with an option to Retry the Search.

4.3 Can Delete a Parent Code That Has Child Codes

State: Done

Type: Bug

User Notes: It is possible to delete a parent Lookup, but when the user attempts to, a warning message is displayed first to warn the user that this will delete all associated children to the parent.

Also, if a user attempts to update the Lookup Code Type from "Parent" to "Child" when the lookup has at least one child code, then the update is canceled and the user is presented with a message.

4.4 When showing Search Results - Search uses the Candidate data dictionary to decide on what to search and the CandidateSearch data dictionary table for Search Results

State: Done

Type: Enhancement

User Notes: Background work was carried out to tidy up the search functionality within Colleague.

Revision History

Version	Date	Summary of Changes	Author
1.0	18/09/18	Initial Draft	David Payne
1.1	19/09/18	Minor Updates and Screenshot	David Payne